Meet Today’s Healthcare Team:

PATIENTS + DOCTORS + MACHINES

Accenture 2018 Consumer Survey on Digital Health — Finland

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Healthcare consumers are increasingly open to using intelligent technologies, sharing data and allowing a combination of man and machine to power a new model of healthcare.

Several healthcare technology advancements are converging to deliver significant benefits to consumers. According to research from Accenture, healthcare consumers continue to show strong use of digital technology for self-service care—and the numbers are rising each year.

Patients are increasingly sophisticated in their use of healthcare technology, while also more open to intelligent technologies taking on elements of their care, such as medical consultations and monitoring.

In some areas, such as patient portals, healthcare providers are keeping pace with demand. But when it comes to virtual care, robotics and artificial intelligence (AI), consumer interest is surpassing what providers currently offer. There is an opportunity for providers to differentiate themselves by offering new, technologically advanced services that satisfy consumer interest and expectations. These services typically help to advance a new model of care in which patients, doctors and machines work together.
Consumers are plugged in

Consumers now use self-service digital health tools that go beyond websites. For several years, Accenture has been conducting multi-country research on consumer healthcare trends, and though this is the first year Finland has been included, there are increases across the board from most of the other countries surveyed. This includes increases in the use of mobile, electronic health records (EHRs), social media, wearables, smart scales and online communities by consumers in the management of their healthcare.

Finnish respondents show strong openness to technology in healthcare in several areas, with 69 percent of the opinion that technology is very or somewhat important to managing health, compared to the seven-country average of 72 percent.

For all countries apart from Finland, either websites or mobile devices are the most used technologies for managing healthcare, with overall averages of 50 percent and 48 percent respectively. For Finnish respondents, EHRs are the most used by some margin, with 72 percent having used these in the past year—the highest of any country surveyed (see Figure 1).

While still an emerging technology, Finland also stands out as a leading user of remote consultations, with 16 percent having used these in the past year, compared to 12 percent overall.

Source: Accenture 2018
Finnish respondents lead all countries on EHR access

The use of technology to manage health is common in Finland, with EHRs central to this. Our survey finds that 74 percent of Finnish respondents have accessed their EHR—considerably more than any other individual country—compared to an overall average of just 33 percent.

Figure 2. EHR access in Finland

Lab test results: the most helpful EHR data

Finnish respondents consider test results (80 percent), physician notes (72 percent) and prescription medication history (70 percent) as the most helpful information available on their EHRs (see Figure 3).

Figure 3. The most helpful information available on EHRs

Source: Accenture 2018
**Finnish respondents are enthusiastic about wearables**

Among Finnish respondents, 82 percent are willing to use wearables that track vital signs; fitness and lifestyle; or both (see Figure 4). This is exactly in line with the seven-country average, however Finnish respondents are slightly more willing to track vital signs (19 percent, compared to 14 percent overall) and a bit less likely to be willing to track fitness and lifestyle (12 percent, compared to 17 percent overall).

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**Figure 4. Wearable usage in Finland**

The figure shows the percentage of Finnish respondents willing to use wearables for different purposes compared to the global average. The chart indicates that Finnish respondents are more likely to use wearables for both vital signs and fitness/lifestyle tracking compared to the global average.

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**Finland respondents are very willing to share their data with clinicians**

86 percent of Finnish respondents are willing to share their wearables data with doctors, and 83 percent with a nurse or other healthcare practitioner. This is significantly greater than for employers (20 percent) and government departments (21 percent), which occupy the bottom of the list (see Figure 5).
Virtual Healthcare

Finnish respondents (73 percent) are more likely than the other countries (59 percent overall) to use virtual services for health status reporting on blood pressure, blood glucose and pulse rate. However, Finnish respondents are aligned with other country respondents when it comes to the top three applications of virtual care: reminders to do things to stay healthy (90 percent), reminders to take medications (89 percent) and daily support to manage an ongoing health issue (78 percent) (see Figure 6).

Figure 6. The top applications for virtual care

Finnish respondents see a variety of advantages in the use of virtual care to manage health. The top three are reducing medical costs to patients (66 percent), accommodating patients’ schedules (56 percent) and diagnosing problems faster (50 percent) (see Figure 7).

Figure 7. The top advantages of using virtual care services

Source: Accenture 2018
While Finnish respondents want virtual healthcare, adoption is still low

As in other countries, only a small portion of the population in Finland has experienced virtual healthcare (15 percent, compared to the overall average of 18 percent, as shown in Figure 8). However, there is a lot of interest in virtual healthcare, suggesting that adoption rates would be high if these services were made available in Finland.

Many applications would be used by more than half of those surveyed, but there are some clear exceptions. For example, only 35 percent of Finnish respondents were willing to use virtual services for mental health counselling or mental group therapy, while the averages across all countries surveyed were 46 percent and 48 percent respectively.
Intelligent technology in healthcare

Only five percent of Finnish respondents have interacted with any kind of AI technology that relates to healthcare (see Figure 9), but they show strong openness to its possibilities.

The most likely AI applications to attract interest from Finnish respondents are: devices to test blood at home for a variety of indicators (74 percent), a virtual coach to manage health/wellbeing (65 percent) and AI technology to analyse DNA and reveal genetic health risks (61 percent).

Source: Accenture 2018
The majority of Finnish respondents surveyed (65 percent) see availability as the top benefit of using an AI-powered virtual doctor (see Figure 10). The top reason for not using such technology is concern around whether the AI doctor would understand well enough (34 percent), something indicative of the limited experience people have with AI to date, and the need for the technology to win the trust of consumers.

The research revealed the importance of education and information in the implementation of AI services. For example, initially, only 36 percent of Finnish respondents would opt for robot-assisted back surgery over traditional surgery. But after being informed of clinical trials that showed how the AI-assisted option had smaller incisions, shorter recovery times, reduced pain, 60 percent then opted for robot-assisted surgery.

Figure 10. Reasons why healthcare consumers will use an AI-powered virtual doctor

- **AI Doc would be available whenever I need it**: 52% (Finnish) / 65% (Seven-Country Average)
- **AI Doc saves time by helping me avoid a trip to the doctor**: 34% (Finnish) / 26% (Seven-Country Average)
- **AI Doc analyzes all health conditions to find possibly related issues**: 26% (Finnish) / 29% (Seven-Country Average)
- **AI Doc can assess vast amounts of relevant information**: 23% (Finnish) / 22% (Seven-Country Average)
- **AI Doc could potentially make useful predictions about my health**: 19% (Finnish) / 23% (Seven-Country Average)
- **AI Doc seems unbiased and neutral**: 12% (Finnish) / 10% (Seven-Country Average)
- **AI Doc would be reassuring to me**: 11% (Finnish) / 11% (Seven-Country Average)
- **I do not like going to the doctor**: 9% (Finnish) / 8% (Seven-Country Average)

Source: Accenture 2018
Genetic Medicine

Only three percent of Finnish respondents have had DNA testing to enable their genetic profile to be used as part of a health assessment or treatment plan (the seven-country average was 11 percent) (see Figure 11). However, 61 percent would like to know their genetic susceptibilities to a disease, while 42 percent want to know their estimated lifespan based on genetic data (see Figure 12).

Figure 11. Propensity for genetic medicine high, but adoption low

Most are happy for their genetic profile to be used by their doctor and stored on their EHR: just over two-thirds (69 percent) would allow their doctor to use a tool that analyses their genetic profile for health risks, 59 percent would share this data anonymously with a university or public research agency, and 55 percent would add their genetic profile to their electronic health record.

Figure 12. Desire to know susceptibility to disease, and lifespan, based on DNA

Source: Accenture 2018
Digital health transformation is here

1. This research suggests that emerging technologies are changing the way consumers think about managing their health.

2. Consumers are increasingly using digital technologies to manage their own health, are adopting virtual care, and recognise the advantages of harnessing the collective power of humans and machines.

3. An increased appetite for use of technology to manage health risks is outpacing how today's health care is delivered.

4. Patients, machines and doctors can work together to improve the accessibility, effectiveness and affordability of healthcare.
Accenture 2018 Consumer Survey on Digital Health

Accenture commissioned a seven-country survey of 7,905 consumers aged 18+ to assess their attitudes toward healthcare technology, modernization and service innovation. It is the latest in a series of annual health technology surveys tracking the perspectives of consumers across themes ranging from electronic health records and health management to virtual health and cybersecurity. The online survey included consumers across seven countries: Australia (1,031), England (1,043), Finland (848), Norway (768), Singapore (957), Spain (957), and the United States (2,301). The survey was conducted by Longitude on behalf of Accenture between October 2017 and January 2018. Where relevant, the survey uses select findings from the Accenture 2016 Consumer Survey on Patient Engagement.

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